FleetFocus

Release Notes

Version: App 5.1.4
Gui 5.1

Material Developed by:

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Our mission is to provide

safe, reliable, cost-effective, efficient transportation management and property reutilization services that exceed our customer expectations.

All Users

General Information
- ✓ *New Bug:* The filter/save preference is not working in this version
- ✓ *Bug Fixed:* You can now use the wildcard ('%') in a choice-list and then use the drop-down menu without producing an error.
- ✓ *Navigating:* You can now use the up and down arrow keys to navigate between rows in the display window. And the left and right arrow keys allow you to scroll back and forth in the display window.
- ✓ *New Name:* Assets are now called Components
- ✓ *New Name:* FleetAnywhere, sometimes known as Fleet Management, is now called 'FleetFocus – FA'.
- ✓ *New Name:* Complaints or most recently, Service Requests, are now called 'Service Requests/Defects'.
- ✓ *New Owner:* Peregrine has sold the software package to Maximus.
- ✓ *New Function:* You may now personalize your FleetFocus screens by color-coding different fields and tabs. To do so, go to Preferences→Color Setup.
- ✓ *New Function:* You may set up a Personal View on your screen. This view allows you to create a menu of FleetFocus screens, other software programs, and web sites for quicker and more convenient navigation. To set up your view, go to Preferences→Personal View→Set Up. If you want the view to automatically open every time you log on to FleetFocus, save it by going to Preferences→Personal View→Save. Then go to View and put a click on Personal View.
- ✓ *New Function:* The Export Data button now works. This button allows you to print (to either a spreadsheet or a text document) the data that appears in any display window.
- ✓ *Performance:* For better performance, do not keep windows unnecessarily open.
- ✓ *Reminder:* The Rental Class Codes 5999 and 5999-Y are only to be used for Heavy Equipment owned by an agency other than Fleet Operations.

Fleet Equipment
- ✓ *New Tab:* A new tab has been added to the Fleet Equipment screen. The Relationships tab displays a nesting tree of all of the components associated with a particular Equipment Unit. In order for information to be displayed on this screen, they have to be attached via the Component Relationships screen.
- ✓ *New Rule:* If an Equipment Unit is surplused by an Agency and then another Agency purchases the unit from Surplus, the new owning agency must enter the Equipment Unit into FleetFocus again and use "NEW" at the beginning of the Serial Number.
- ✓ *Reminder:* Information must be entered into the Meter at Delivery field. This data is critical for calculating cost per mile, especially when the unit was purchased used.
- ✓ *Bug Found:* Both Equipment and Components are displayed in all of the Choice-lists on the Component Relationships screen.
- ✓ *Bug Fixed:* The Number of Open Work Orders field on the Status tab now works if the unit is in an Active Life Cycle Status.
- ✓ *New Function:* The Operator Name field in the Additional Operators screen group (located on the Assignments tab) is now a display only field.
- ✓ *Bug Found:* You must use the scroll bar to access the options in the bottom part of the filter. Tabbing from the top to the bottom does not work anymore.
- ✓ *Sneak Peak:* The following three filter options are currently visible and will be useable soon: Vehicle Location, Building Location, and Other Location Data.

Components→Primary Information
- ✓ *New Field:* The Asset Number field has been added to the Basic Info tab.
- ✓ *New Field:* The Next PM Due at Meter Reading field has been added to the Class PM Program tab.
- ✓ *Net Tab:* The Component Relationship tab has been added to this screen. This tab displays a nesting tree of all of the components associated with a particular Equipment Unit. In order for information to be displayed on this screen, they must be documented via the Component Relationships screen.
- ✓ *Bug Fixed:* The Number of Open Work Orders field on the Status tab now works if the unit is in an Active Life Cycle Status.

Events
✓ *Gone:* This screen is no longer available.

Assignment History
✓ *New Screen:* This screen now displays a meter history of component relationships as they are added, deleted, or modified.

Positions
✓ *New Screen:* This s a new screen created to show positions on a vehicle. Positions are used in Serialized Parts and other Parts applications. If you are interested in utilizing this screen, contact your Technical Support Representative.

Service Requests/Defects
✓ *New Name:* The name of the Service Requests screen has been changed to Service Requests/Defects.
✓ *Date and Time:* FleetFocus no longer requires entry in the Date and Time required field.
✓ *Task Choices:* The Task ID choice list is now restricted to show only active tasks that are REPAIR GROUP or REPAIR TASK.
✓ *Filtering:* There is still a bug with this screen in that you cannot perform a generic filter that pulls *all* service requests. Currently, a generic filter only retrieves requests in PENDING status. A ticket has been created with Maximus.
✓ *New Field:* A Symptom field has been added to the Basic Info tab. FleetFocus requires either a task ID or a Symptom to be entered on new service requests. This is helpful if the end user or operator entering the request does not know the Task ID structure. Instead, a symptom could be chosen, allowing the service writer in the shop determine the appropriate task ID.
✓ *New Field:* Incident Id has been added to the Basic Info tab. This is a free form field, numeric only field.
✓ *New Field:* A Comment field has been added to the Comments tab for Condition. This can be used for recording information specific to the condition/defect of the equipment unit.

Equipment Due for PM/Inspections
✓ *Filter:* The Include Services to be 'Soon Due' by Meter checkbox has been added to the filter.

Historical Costs
✓ *New Tab:* A Cost Summary tab is now available on this screen. It displays an itemized Year-to-Date and Life-to-Date summary.

Assignment History
✓ *Filter:* The Station Location Id field has been removed from the filter.

Incident Management
✓ *Gone:* This screen is no longer available.

Lease Agreements
✓ *New Screen:* The Lease Agreements screen is now available (Data→Equipment Management→Lease Agreements). Information to be tracked on this screen include Contact Information, Payment Information and displays all Equipment Units associated with each lease. When the Lease Id is entered on the Fleet Equipment screen the Monthly Rent, Lease Expiration Date, and Residual Value are automatically filled in. The Lease Id has been included on the Fleet Equipments Filter.

Procurement
✓ *New Screens:* You can now document Bids, Estimates, and Requisitions through FleetFocus. To explore these screens go to Data→Procurement menu.

Operators

Authorized Operators

- ✓ *Explanation:* A check in either or both of the first two boxes (Can Use Pool Unit and/or Can Have Permanently Assigned Vehicle) on the Authorization tab indicates an Authorized Operator. The State of Utah Mandates that all persons driving state vehicles display and submit to file a valid driver's license information. In an effort to help agencies keep track of current drivers, Fleet Operations runs a weekly report and updates the information in the following manner:
    - o If the Operator has not made a reservation in his or her name for the past six months and if there is not a future reservation made in his or her name (created in the Motor Pool Module), then the Can Use Pool Unit box is automatically *unchecked.*
    - o If the Operator *is* assigned to an Equipment Unit on the Fleet Equipment screen, then the Can Have Permanently Assigned Vehicle box is automatically *checked*.
    - o If the Operator *is not* assigned to an Equipment Unit on the Fleet Equipment screen, then the Can Have Permanently Assigned Vehicle box is automatically *unchecked*.

Invalid Operators

- ✓ *Explanation:* A check in this display only field indicates that the operator's driver's license is invalid for one of the following reasons:
    - o The information on the Driver's License tab is incorrect.
    - o The information is missing from the Driver's License tab.
    - o The operator is on record at the DMV as having an Invalid, Expired, or Suspended Driver's License. If this is the reason for a check in this box, there will be a short description provided by the DMV stating why the license is invalid. You will find this description in the Pool Unit Preferences field on the Motor Pool tab of the Operators screen and on the Operator Info tab of the Motor Pool Center screen.

Reports are run weekly to update the information in this field. If there is a check in this box, it is imperative that the operator is not allowed to drive a state vehicle until their Driver's License issue is resolved.

Motor Pool

Motor Pool Center

- ✓ ***Bug Found:*** You cannot dispatch a reservation from Committed Status. You must first change the reservation status to Confirmed and take away the Equipment Id from the Dispatch tab and the process the reservation. This bug is should be fixed in the next version.
- ✓ ***Remember:*** If you are using the system 'Live', you *must* double-check all information on all tabs prior to dispatching a vehicle to an operator. The most important fields to check are the Pool Unit Preferences field and the Account field.
- ✓ ***New Rule:*** <u>All</u> persons intending to drive a motor pool rental *<u>must</u>* be documented on the Reservation. The first Operator listed is considered the Primary Operator.

Units Available

- ✓ ***New Screen:*** The Units Available screen is now properly working. To access it, go to Data→Equipment Activity→Motor Pool→Units Available. This screen will display equipment that is *currently* available for dispatch.

Work Order's

Work Order Center & Work Order-Short Form
- ✓ **Bug Fixed:** FleetFocus now properly distinguished between an Inspection and a PM task Id so both can be entered and updated on a single work order.
- ✓ **Bug Fixed:** FleetFocus now allows the user to uncheck the Work finished checkbox field.
- ✓ **Bug Fixed:** Printed work orders now correctly include the name of the department to which the equipment unit was assigned at the time the work order was opened.
- ✓ **Bug Fixed:** FleetFocus now correctly reverses misc. cost charges when reversing from the Commercial tab. You no longer have to enter the negative sign in front of the cost. Simply reverse the charges that way all of the other charges are reversed.
- ✓ **Bug Fixed:** FleetFocus no longer produces an error regarding meters when opening a work order for a Component equipment unit.
- ✓ **Bug Fixed:** The PM task checklist now correctly prints when the task ID is longer than one character.
- ✓ **Gone:** The following fields have been removed from the Work Order Center filter:
    - Date and Time Opened
    - Date and Time Closed
    - License Number
    - Department ID
    - Reference Order ID
    - User ID Order Opened By
    - Multi-Unit project ID
    - Include Messages for Associated Components
- ✓ **New Button:** The More Info tab now includes a Test Results button that will launch the Test Results screen and default the equipment and work order information.
- ✓ **New Messaging:** Instead of displaying a red question mark, the Messages tab is now colored red if there are any important messages pertaining to the equipment unit.
- ✓ **New Name:** The Service Request Tab had been changed to 'Service Requests/Defects'.
- ✓ **New Messaging:** Instead of displaying a red question mark, the Service Requests/Defects tab is now colored red if there are any pending Service Requests.
- ✓ **New Fields:** The Symptoms field and the Condition Comments field have been added to the Service Requests/Defects tab. Symptoms describe the basic condition of the issue in need of repair. IE: Squeaky Brakes, Noisy Muffler, Overheating, etc.
- ✓ **New Fields:** The Serial Number field has been removed from Parts tab and replaced with Installed Serial Number and Removed Serial Number.
- ✓ **Gone:** Tech/Vendor has been removed from the Work Order-Short Form filter.
- ✓ **Bug Fixed:** The Number of Open Work Orders field on the Status tab of the Fleet Equipment screen now works if the unit is in an Active Life Cycle Status.
- ✓ **New Function:** The choice list for Inventory Location Id is now restricted to include only locations that the logged-on User has rights to (defined with location security on the User Groups screen). The User will not be allowed to issue parts on these screens from a location for which the User is not authorized.
- ✓ **New Field:** The Positions field is now available for determining where a part is positioned on the Equipment Unit.

Work Order Completion
- ✓ **New Screen:** The purpose of the Work Order Completion screen is to display and record information about completed work orders, including the Ids of the employees who complete work on the orders' tasks and their completion/work accomplished codes. The advantage of this screen over other work order screens is that on this screen you can view and update information related to PM tasks and you can assign work accomplished codes to all tasks in one process. If you are interested in utilizing this screen, contact your Technical Support Representative.
- ✓ **New Functionality:** A Task Completion Percentage screen group has been added to the Task Completion tab. It contains the following fields:
    - Task ID
    - Work Accomplished Code
    - Employee ID

- Employee Name
- Percentage

✓ *New Function:* If more than one mechanic has posted time to the same task on the same work order, you can now track the percentage of the work that each mechanic performed for that task. To enter percentages for tasks when reviewing or closing a work order, use the Task completion percentage group on the Task Completion tab on the Data→Shop Activity→Work Order Completion screen.

✓ *New Name:* The Service Request Tab has been changed to 'Service Requests/Defects'.

✓ *New Field:* The Symptom field has been added. Symptoms describe the basic condition of the issue in need of repair. IE: Squeaky Brakes, Noisy Muffler, Overheating, etc.

Work Order Closing

✓ *New Screen:* The purpose of the Work Order Closing screen is to close multiple work orders in one process. You can use Update mode to change the Job status of the work order to Work Finished or Closed. If you are interested in utilizing this screen, contact your Technical Support Representative.

✓ *New Button:* An Edit Selected Work Order button has been added which takes you to the Data→Shop Activity→Work Order Center screen for the selected work order to make any necessary changes.

✓ *New Function:* If you know you would like to close all work orders listed you can click on the Close all work orders listed checkbox to mark all work orders as closed.

✓ *New Display:* Work order details are now shown for the selected work order.

✓ *New Function:* The Total Cost value indicates labor cost, parts cost, commercial labor cost, commercial parts cost, commercial miscellaneous cost, and commercial tax amount.

Work Assignment

✓ *New Screen:* The new Work Assignment screen allows you to plan the work in your shop and adjust the plan at any time. If you are interested in utilizing this screen, contact your Technical Support Representative.

Warranty Claims

✓ *Bug Fixed:* Fleet Focus now correctly updates Equipment Historical Costs when claim settlement costs are updated.

Parts

General
✓ *Expanded Field:* Part unit prices have been expanded to support up to four decimal places.
✓ *New Function:* A screen is now available that allows parts to be serialized. See Serialized Parts, below, for more information.

Parts Issues and Returns
✓ *New Fields:* The following fields have been added to the Parts Issues and Returns screen:
- Position ID
- Installed Serial Number
- Removed Serial Number

Parts→Primary Information & Location Information
✓ *Bug Fixed:* The Part Suffix field on the Kit Components tab of the Primary Information screen now displays correctly.
✓ *New Tab:* A Serial Numbers tab has been added with the following fields:
- Serial Number
- Location ID
- Location Name
- Vendor ID
- Vendor Name
- Receipt Date

This is a display only tab. Serial numbers can be entered either through the Serialized Parts screen, the Receipts screen, or when issuing to a Work Order.

✓ *New Tab:* An Attributes tab has been added with the following fields:
- Delete
- Attribute ID
- Attribute Name
- Text Value
- Numeric Value
- Comments
- Path and File Name

Serialized Parts
✓ *New Screen:* You can now track the serial numbers of important or expensive stocked parts. This screen displays specific information about the part including its status and recent history. Information can be added to this screen in the following ways:
- Once the part is entered into inventory, you may enter serial number for each part on the Serialized Parts screen. The status must begin with "In Stock". Once entered, the information defaults to the Serial Numbers tab on the Parts→Primary Information and Location Information screens.
- You may enter the serial number at the time of receipt. This will automatically create a record on the Serialized Parts screen, put the status "In Stock", and display the information on the Serial Numbers tab on the Parts→Primary Information and Location Information screens. To do this, Parts must be received one at a time.
- When a part is issued to an Equipment Unit via a work order, you may include the serial number. Once processed, a new record will automatically be created on the Serialized Parts screen. The status will default to "Installed", the Work Order Number will be displayed on the Serialized Parts screen, and the serial number will be displayed on the Serial Numbers tab on the Parts→Primary Information and Location Information screens. To do this, Parts must be received one at a time. If there was already a record for the part on the Serialized Parts screen then the current status will be moved to "Installed" and the Work Order Number will be displayed.

Direct Issues

✓ *New Function:* When processing a return to an equipment unit, FleetFocus now requires you to enter a unit price. The price must have already been issued to that equipment unit on a previous issue.

Receipts

✓ *New Field:* The Serial Number field has been added to the Receipts tab.
✓ *Bug Fixed:* The Receipt Part Id and Suffix fields now correctly fill based on the Part Id and Suffix fields when the Part Id exists with more than one suffix.

Part Transfers

✓ *New Field:* The Serial Number field has been added to the Parts List tab.

Parts Order Management

✓ *Bug Fixed:* Marking a line item as deleted now correctly closes the line item and decrements any remaining quantity on order for the part.

Attributes

✓ *New Screen:* The Parts Items→Setup→Attributes screen defines additional attributes to track on parts. Specify whether the attribute applies to Primary Information or Location Information. Select any number of attributes to track and enter a value, comment, or an associated file for the attribute.

Positions

✓ *New Screen:* A new screen (Data→Equipment Units→Setup→Positions) is now available for determining where a part is positioned on the Equipment Unit.

Fuel Tickets

General

✓ ***Field Moved:*** The Meter 1 & 2 fields have moved next to the automatic display of the Equipment Description field. Since this field displays the Latest Meter Reading, data-entry will be easier.

✓ ***New Field:*** An Employee/Operator field has been added to both Internal and External Fuel Tickets screens so that you can track who fueled the equipment.

✓ ***New Field:*** A Vendor Id field has been added to the External Fuel Tickets screen so that you can track where the fuel was purchased.

✓ ***New Field:*** A Comments field has been added to the External Fuel Tickets screen.

<u>Accidents</u>

General

- ✓ **_Redefined:_** The choices available for use in the Accident Type field have been modified. "Other" is no longer a valid choice. In addition to the remaining choices, the following are also now valid choices: "Vandalism", "Animal", "Road Debris", "Nature", and "PIT Maneuver".

System Administration

General
- ✓ *Expanded Field:* FA now supports PM Service and Inspection Task Ids up to 12 characters.
- ✓ *Gone:* The Connected Users tab has been removed from the Application Monitor screen.

User Interface
- ✓ *Bug Fixed:* If labels or field attributes were modified through Admin mode, those changes will now be correctly saved when upgrading from version 5.0x to version 5.1.4.

Database
- ✓ *Conversion:* The conversion of 5.0 → 5.1 includes automatically setting the vendor and user currency Id settings to the value specified for the base currency if the currency Id is not set on the vendor or user.
- ✓ *Script:* The script expand_class.sql is called during the upgrade process. This expands the equipment class ID in all appropriate tables from 8 characters to 21 characters.
- ✓ *New Function:* Inserting a new row into a table in the database now captures the logged in user ID who performed the action. The user ID is written to the X_userid_insert column on the table.
- ✓ *Bug Fixed:* The setpass.exe now correctly changes the database password that the application uses to connect to the database. (MS SQL Server only)
- ✓ *New Index:* An index has been added to the table behind Work Order Summary.
- ✓ *New Function:* FA now tracks the completion and original due information for PM and Inspection services performed. This data is updated when the schedule is updated, and is stored in the TSK_MAIN table for reporting purposes.

Performance
- ✓ *Improved:* To improve performance and reduce possible database locks, the call that the application makes to the database to ensure it still has a connection has been greatly simplified.

Work Orders
- ✓ *New Function:* Work order numbering can now be based off of fiscal year instead of calendar year. Set the current fiscal year designation on the Data→Setup→Options screen. To immediately reset the numbering to zero, click the Reset numbering for new year button on the End of Period screen.
- ✓ *Bug Fixed:* Version 4.2.01 included a fix of the Work Order Center screen to not allow the same task Id to be entered more than once on the same work order. To move any old duplicate task rows to another table for reference, click on the Remove Duplicate Tasks on Work Orders button on the Special Items Tab of the Data→Shop Activity→Setup→Options screen. The tasks are put on the TEMP_TSK_MAIN table.
- ✓ *Bug Fixed:* FA now correctly allows a task Id to be renumbered to an Id that does not already exist. If the task Id is renumbered to an Id that does already exist, the history for the two tasks will be merged.

Vendors
- ✓ *Bug Fixed:* FleetFocus now correctly prohibits you from deleting a vendor that has been assigned to a location as a preferred PM Vendor.
- ✓ *New Function:* When adding a new vendor, FleetFocus requires that you enter the currency Id for the vendor.

Parts
- ✓ *New Security:* The choice list for Inventory Location Id is now restricted to include only locations that the logged-on User has rights to (defined with location security on the User Groups screen). The User will not be allowed to issue parts on these screens from a location for which the User is not authorized:
  - Shop Activity→Work Order Center; Parts Tab
  - Shop Activity→Work Order Short Form; Parts Tab

- ✓ **New Screen:** The Parts Items→Setup→Attributes screen defines additional attributes to track on parts. Specify whether the attribute applies to Primary Information or Location Information. Select any number of attributes to track and enter a value, comment, or an associated file for the attribute.

Access Rights
- ✓ **New Function:** When adding a new user, FleetFocus requires that you enter the currency Id for the user.
- ✓ **Not Available:** Do not give access to the Equipment Management→Consist Management screen. This screen goes along with Rail Management.
- ✓ **New Functions:** The following Checkboxes are now active:
  - ▪ Approve Work Orders
  - ▪ Change work order open date and time
  - ▪ Change work order close date and time
  - ▪ Override work order repair reason
  - ▪ Override work order work class
  - ▪ Override work order warranty status

Equipment Units
- ✓ **New Function:** FleetFocus no longer requires a year, manufacturer Id, or model Id when defining an Equipment Type.
- ✓ **New Screen:** A new screen (Data→Equipment Units→Setup→Positions) is now available for determining where a part is positioned on the Equipment Unit.
- ✓ **New Screen:** FleetFocus now supports a standard list of symptoms (Data→Shop Activity→Setup →Symptoms). Symptoms describe the basic condition of the issue in need of repair. IE: Squeaky Brakes, Noisy Muffler, Overheating, etc.